Quick Reference Guide:

## Using the MT Edition for the TEAMS Extract

This guide explains how to prepare the MT Edition application to extract a"Teacher-Class" file to upload into TEAMS. This guide is designed for schools that do not have an existing student information system.

Topics covered in this Quick Reference Guide include:

- Preparing Calendars
- Entering Teachers
- Entering Courses
- Assigning Students to Courses
- Completing the Extract



Districts that do not use a student information system may use the MT Edition application to store and extract data to submit on TEAMS. TEAMS (Terms of Employment, Accreditation and Master Schedule) is OPI's online system used to collect data for school accreditation (aka Annual Data Collection). In the MT Edition, districts may enter schedules, courses and teachers and assign students to courses. Data may then be extracted in a format suitable for upload into the "Teacher-Class" screen of the TEAMS system.



Before beginning, consider the following:

#### 1. What is TEAMS?

 Terms of Employment, Accreditation and Master Schedule (TEAMS) is a collection that replace the previous Annual Data Collection (ADC). In TEAMS, districts report courses and teaching assignments at the class level. page 2

#### 2. What calendar information is required?

 Districts must identify student enrollment dates and enter a daily schedule so TEAMS can accurately calculate student instruction time. page 2

#### 3. What information is required for teachers?

 Teachers must have an SEID (previously known as the Folio Number), an employment record and an assignment into a school to be attached to the TEAMS extract. page 6

# 4. What do I need to know about the courses students are taking?

 Depending on the certification of the educator, students in grades K-6 generally need to be assigned only to a grade level course. Students taking courses from educators with specialized certifications (e.g., Physical Education teachers) and 7-8 and high school students will need to be assigned to a specific subject area course. page 9

#### 5. How are students attached to courses with teachers?

 Teachers are assigned to the courses they teach and students are placed on a roster for that course. The TEAMS extract only records the number of students in a course, but not names of students. page 15

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#### **TEAMS - Terms of Employment, Accreditation, and Master Schedule**

This collection will fulfill a number of new and anticipated reporting requirements in addition to replacing the existing Annual Data Collection (ADC).

- The Terms of Employment collection reports the employment status of each employee of the district, including position code, FTE portion, base salary, employment start and end dates, total annual days and hours, Full-time/Part-time status, and permanent/temporary status.
- The Accreditation component collects information about the schools' compliance with the Montana School Accreditation Standards.
- The Teacher-Class collection includes information on course catalog and teaching assignments at the class level.

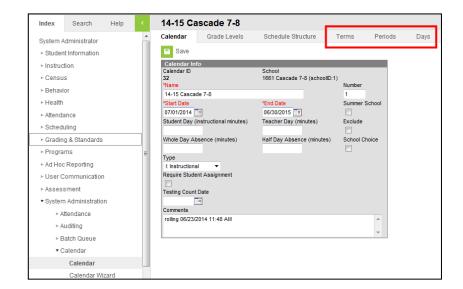
This guide will specifically address the Accreditation and Teacher-Class portions of the TEAMS project.

More information on the TEAMS project may be found on the OPI webpage at:

http://www.opi.mt.gov/Reports&Data/Teams.html

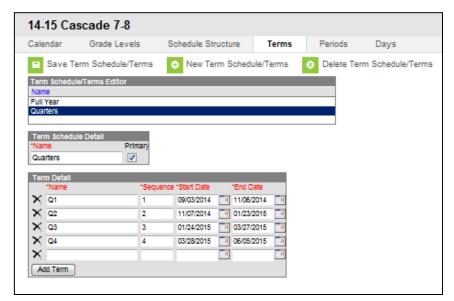
#### MT EDITION CALENDARS

For general AIM reporting, districts are required to create calendars with basic district information. For the purposes of the TEAMS collection, districts must also enter **Terms**, **Periods** and **Days**.









#### **Terms**

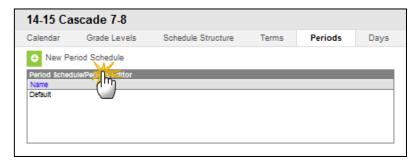
Terms define the periods of time in which students are enrolled in courses. If districts only have full-year courses, only a full-year term is required. If students rotate courses on either a quarter, trimester or semester schedule, *click* New Term Schedule/Terms to define those terms.

Enter Start Date and End Date for each term. Click Save.

#### **Periods**

Periods define the time that students spend in courses. If the school is only recording time in one course (e.g., 1<sup>st</sup> grade or 2<sup>nd</sup> grade, etc.), the district only needs to create one period. (use default for this.) If students transfer from one course to another (e.g., high school) the periods need to reflect that movement between courses.

**NOTE:** If the MT Edition will be used to record attendance, periods may be set up based on times attendance will be taken (e.g., before and after lunch).



Auto Create Period Schedules					
Parameter Selection					
This Schedule Structure has no Period Schedules, and this tool will create some for you. Infinite Campus supports multiple Period Schedules, but only select the Period Schedules needed for your Schedule Structure.					
1. Select Number of Period Schedules					
√ (1 PeriodSchedule) Single Period Schedule					
(2 PeriodSchedules) A/B Day					
(3 PeriodSchedules) A/B/C Day					
(5 PeriodSchedules) M/T/W/T/F Day					
Select Number of Periods for each Period Schedule					
6					
Create PeriodSchedules/Periods					

Click New Period Schedule to add a schedule.

**Select Number of Period Schedules**. For each schedule, you must enter a list of periods and times in the next step, so use the least number of schedules as possible to reflect the school's activities accurately.

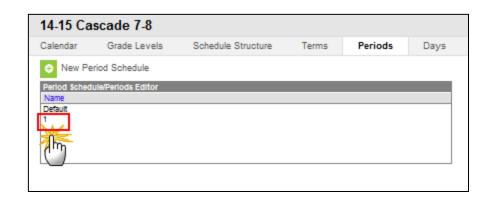
Select Number of Periods for each Period Schedule. Enter the number of periods for the schedule being added. You can add more in the next step, if needed.

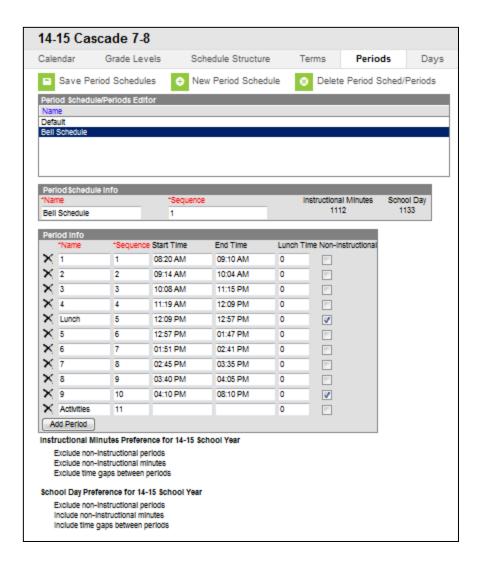
Click Create Period Schedules/Periods.





To list the period information, click the schedule just added.





Enter a schedule **Name** (e.g., Bell Schedule, Early Out Days, etc.), if desired.

Enter **Start time** and **End Time** for each period.

Check Non-Instructional for every period that is not pupil instruction time.

Click Save Period Schedules.

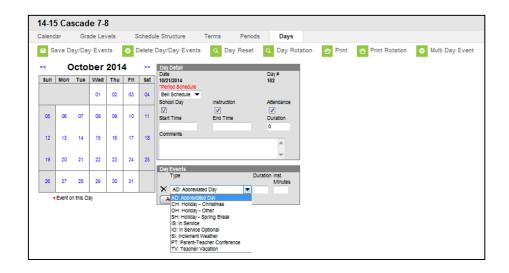
**NOTE:** After saving, the *Instructional Minutes* and *School Day* minutes are calculated, as shown on the Period Schedule Info.

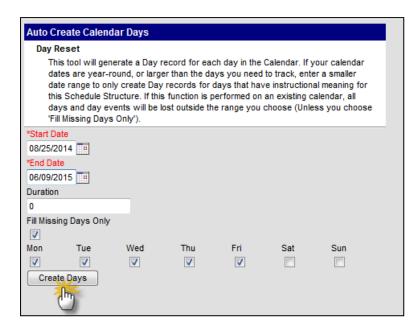


#### **Days**

The Days tab is used to identify the days on which students receive instruction. Holidays, early release days, and teacher in-service days are included.

Excluding or shortening days reduces the total number of instructional minutes for a course.





First, set the range for school days. This should include your PIR days.

On the **Days** tab, click *Day Reset*. Enter the *Start Date* (the date of the first PIR day) and the *End Date* (the date of the last PIR day). If school is not held on Friday, un-check Friday.

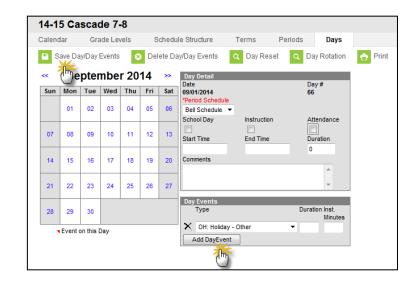
Click Create Days.

Second, adjust for days school is not held.

Select a date by clicking the number. For PIR days, uncheck *Instruction* and *Attendance*. For holidays or other nonschool days, uncheck *School Day*, *Instruction* and *Attendance*. For shortened days, enter the *Start Time* and *End Time*.

To enter *Day Events*, click *Add Day Event*. Select *Type*.

Click **Save Day/Day Events**. Repeat for all altered instruction days.



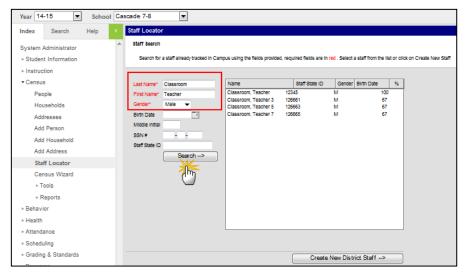




#### **TEACHERS**

To include a teacher and/or paraprofessional responsible for student instruction in TEAMS, add them to the MT Edition application using the following steps.





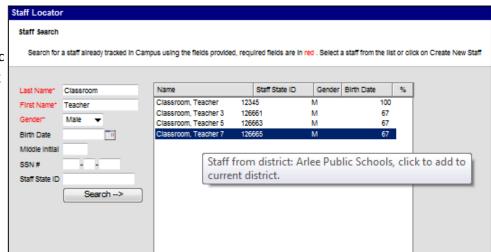
#### **Add Staff**

From the **Index**, expand **Census**. Select **Staff Locator**.

Enter the teacher's *Last Name*, *First Name* and *Gender*. Click *Search*.

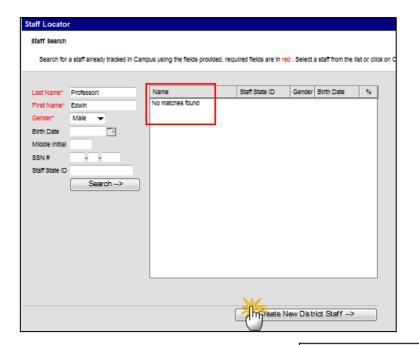
The search results display any teachers entered into another District or MT Edition. Verify the teacher's demographic information and select the corresponding match.

**NOTE:** Hovering over the name of the teacher will show the last district of employment – the same as the student locator does for students.









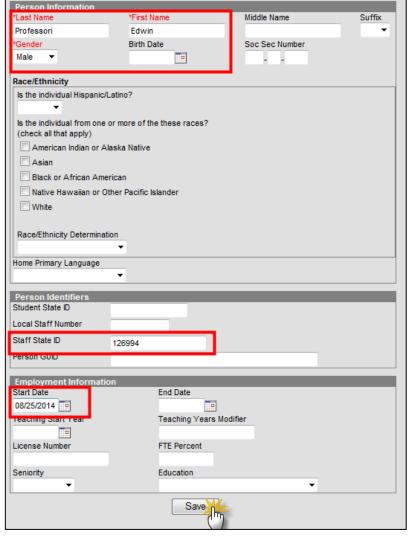
If there is no match for the teacher being entered, click *Create New District Staff*.

Required fields are: Last Name, First Name, Gender and Employment Start Date.

However, for the TEAMS extract, the teacher's SEID (Folio Number) must be entered in the *Staff State ID* field.

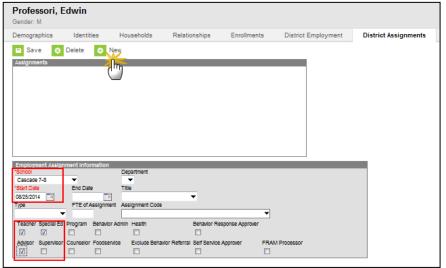
Enter the required data and click Save.

**NOTE:** The *Staff State ID* number was previously an auto-generated number. The district may need to replace the autogenerated number with the correct SEID number.









#### **Indicate District Assignments**

Select the **District Assignments** tab and click **New**.

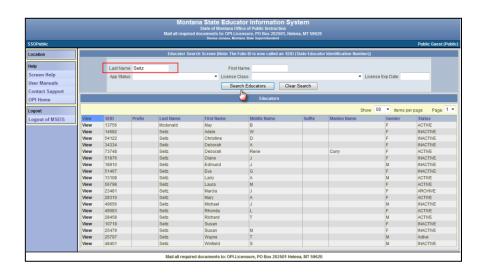
Select the School, enter a Start Date and check the box for Teacher (if the teacher will be a **Team Member** for Special Education students, also check Special Ed and/or Advisor). Click Save.

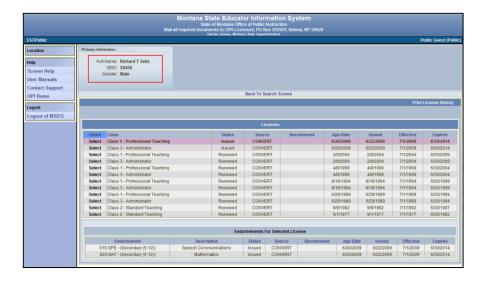
If a teacher is assigned to multiple schools, create an assignment for each school.

The teacher's SEID (Folio Number) may be found on the teaching certificate or located using the Montana State Educator Information System (MSEIS) Educator Search at:

https://apps3.opi.mt.gov/MSEIS/autos
tart.aspx?Public=1

Enter any of the known elements of the teacher's demographics and/or license information and click **Search Educators**.





Click *View* to see the specific license history and information for the selected teacher.

The SEID is located at the top of the page, under the teacher's name.

**NOTE:** Information shown here was obtained from the public site. Districts have access to the secure MSEIS/TEAMS site.





#### **COURSES**

Courses are entered into the MT Edition depending on the certification of the teacher and the grade level of the student.

For elementary students taught by K-8 certified elementary teachers, only a "grade level" course (e.g., 1<sup>st</sup> grade, 2<sup>nd</sup> grade, 3<sup>rd</sup> grade) is required.

Students taught by a specialist need to be enrolled into their specified courses (typically middle and/or high school students). Districts will also need to account for specialists who supplement a student's education (e.g., K-6 physical education teachers).



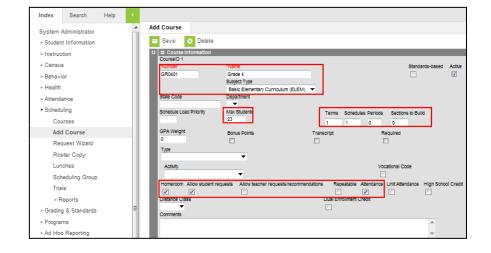
### **General Elementary Courses**

Select the current Year, School and/or Calendar.

From the **Index**, expand **Scheduling** and select **Add Course**.

Enter Number and Name (district specified), Max Students (set at a higher number than would ever be enrolled in the course), Terms (same as number of terms entered on calendar), Schedules (typically 1), Periods (number of periods for course), and check Allow Student Requests.

**OPTIONAL:** Check *Homeroom* and *Attendance* as appropriate – if using the MT Edition application to take attendance.







Under **NCES Data**, choose *SCED Subject Area*, *SCED Course Identifier*, *SCED Lowest Grade*, *SCED Highest Grade*, *SCED Course Level* and *SCED Sequence* (1 of 1, unless splitting a full year course into semesters – 1 of 2 – or trimesters – 1 of 3). The NCES code auto-fills after this identifying data is entered.

Click Save (top of screen).

Year 14-15

► Instruction

► Behavior

▼ Scheduling Courses

> Add Course Request Wizard Roster Copy

Scheduling Group

► Reports

► Grading & Standards

► Programs

Search

System Administrator

► Student Information

**NOTE:** Elementary courses are numbered 51 to 73 and contain the notation (prior-to-secondary).

For specific information on K-12 Course Codes and course mapping, see the OPI School Staffing webpage at:

▼ School Cascade 7-8

http://www.opi.mt.gov/Reports&Data/TEAM S.html#gpm1 6

▼

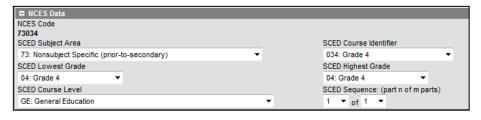
Grade 7 English

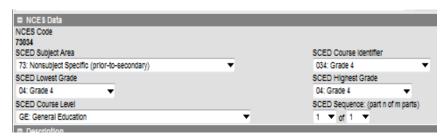
Core Academic Subject Area (CORE) ▼

English (ENG)

Subject Type

Save S Delete





#### Middle/High School Courses

Select the current **Year**, **School** and/or **Calendar**.

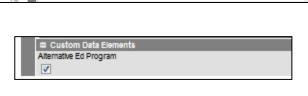
From the **Index**, expand **Scheduling** and select **Add Course**.

Enter Number and Name (district specified), Max Students (set at a higher number than would ever be enrolled in the course), Terms (same as number of terms entered on calendar), Schedules (typically 1), Periods (number of periods for course), and check Allow Student Requests.

If the course is *Distance Learning* or *Dual Enrollment*, check the appropriate box.

If the course is part of an Alternative Education Program for At Risk Youth, *check* the **Alternative Ed Program** box under **Custom Data Elements** at the bottom of the **Course** tab.

**OPTIONAL:** If using the MT Edition application to keep attendance, check *Homeroom* and *Attendance* as appropriate.







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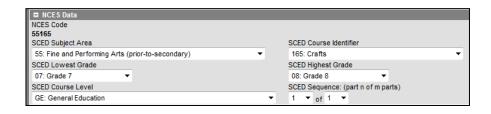
Elementary (Grades 5-8): Under NCES
Data, choose SCED Subject Area, SCED
Course Identifier, SCED Lowest Grade,
SCED Highest Grade, SCED Course Level
and SCED Sequence (1 of 1, unless
splitting a full year course into semesters
– 1 of 2 – or trimesters – 1 of 3).

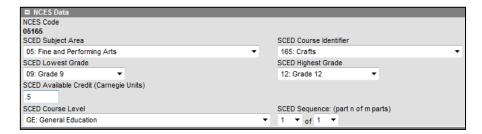
Click Save.

**NOTE:** Elementary courses are numbered 51 to 73 and contain the notation (priorto-secondary).

For specific information on K-12 Course Codes and course mapping, see the OPI School Staffing webpage at:

http://www.opi.mt.gov/Reports&Data/TE AMS.html#gpm1\_6





High School (Grades 9-12): Under NCES Data, choose SCED Subject Area, SCED Course Identifier, SCED Lowest Grade, SCED Highest Grade, SCED Available Credit, SCED Course Level and SCED Sequence (1 of 1, unless splitting a full year course into semesters – 1 of 2 – or trimesters – 1 of 3).

Click Save.

**NOTE:** Secondary courses are numbered 01 to 22.

For specific information on K-12 Course Codes and course mapping, see the OPI School Staffing webpage at:

http://www.opi.mt.gov/Reports&Data/TEAMS.html#gpm1\_6





#### **Courses by Specialists**

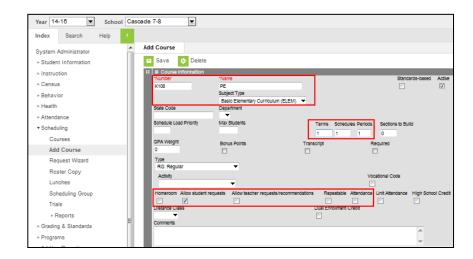
If the K-6 (or K-8) curriculum uses specialists in courses such as Music, Art, etc., enter those courses separately from the grade/classroom courses (e.g., 1st grade, 4th grade, etc.).

Select the current **Year**, **School** and/or **Calendar**.

From the **Index**, expand **Scheduling** and select **Add Course**.

Enter *Number* and *Name* (district specified), *Subject Type*, *Terms* (same as number of terms entered on calendar), *Schedules* (typically 1), and *Periods* (number of periods for course).

**OPTIONAL:** Check *Homeroom, Allow Requests* and *Attendance* as appropriate.



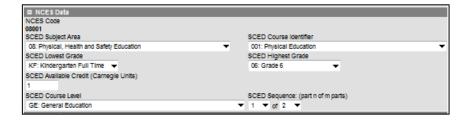
Elementary (Grades K-6 or K-8): Under NCES Data, choose SCED Subject Area, SCED Course Identifier, SCED Lowest Grade, SCED Highest Grade, SCED Course Level and SCED Sequence (1 of 1, unless splitting a full year course into semesters – 1 of 2 – or trimesters – 1 of 3).

Click Save.

**NOTE:** Elementary courses are numbered 51 to 73 and contain the notation (prior to secondary).

For specific information on K-12 Course Codes and course mapping, see the OPI School Staffing webpage at:

http://www.opi.mt.gov/Reports&Data/TEA MS.html#gpm1 6





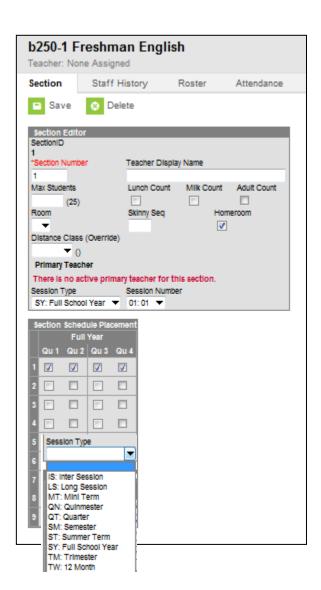
#### **Creating Sections**

Sections define the time period that courses occur and link teachers and students to courses.

Choose the current **Year**, **School** and/or **Calendar**. From the **Search** tab, *Search for Course/Section*. Click **Go**.

Choose a course. Click the **Sections** tab.





#### Click Add a Section.

Enter Section Number. Select Session Type.

The Session Number corresponds to the Session Type. For example, if Session Type is Quarter, the Session Number for this course will be 1, 2, 3, or 4 for 1<sup>st</sup> quarter, 2<sup>nd</sup> quarter, etc.

For a full year course there is only one *Session Number*.

Check the boxes that correspond to the time the course is offered. If a course is offered more than once per day, create a separate section for each time the course is offered.

Click Create Section.





Click the Staff History tab.

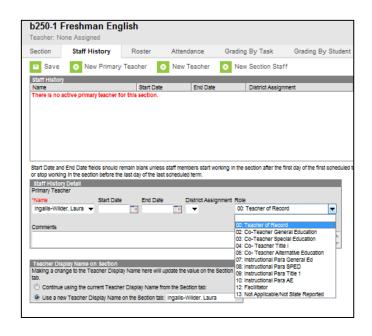
Select **New Primary Teacher**. Select a name from the **Name** dropdown list.

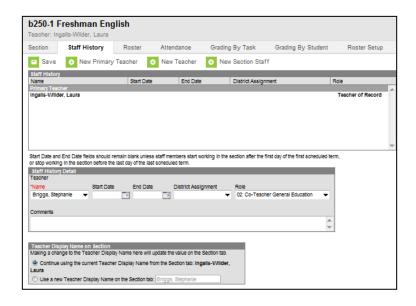
#### Choose a Role.

The teacher selected as *Primary Teacher* should have a *Role* of *OO: Teacher of Record* and hold an appropriate MT certification to teach the selected course. Only one *Primary Teacher* may be identified for each course.

#### Click Save.

**NOTE:** For distance learning courses, the district must have a *Facilitator* assigned to the course under *Primary Teacher*.





If another teacher will be sharing the teaching responsibilities with the *Primary Teacher*, select *New Teacher*.

Choose the name of the second teacher from the dropdown list and choose a **Role**.

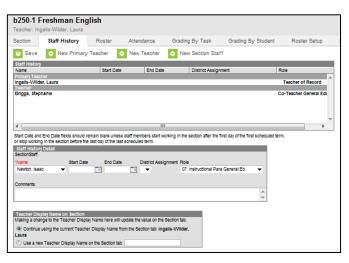
#### Click Save.

NOTE: The teacher holding the proper endorsement for the course should be identified as the *Primary Teacher*.

If another staff member will be sharing the teaching responsibilities (e.g., a paraeducator) with the *Primary Teacher*, select *New Section Staff*.

Choose the name of the staff member from the dropdown list and choose a **Role.** 

Click Save.







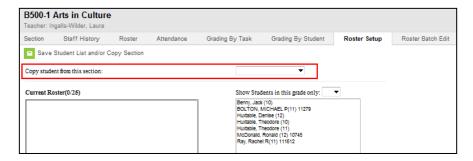
#### **CREATING ROSTERS**

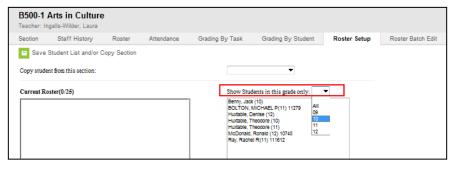
TEAMS will derive an enrollment count from student rosters entered in MT Edition and uploaded into the TEAMS Teacher-Class data collection

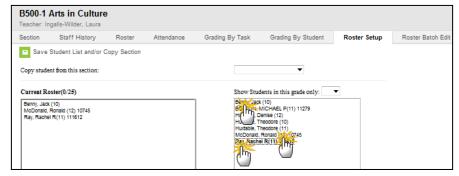
After searching for the Course/Section (see page 13), *select* the **Roster Setup** tab.

Students may be selected in multiple ways:

- Copy student from this section: –
   Select a section for which students are already enrolled, and the screen will copy that list of students to this section helpful if there are AM and PM sections of a course or all students in a grade are taking the same courses. NOTE: When using this option, students don't appear under Current Roster until Save Student List and/or Copy Section is selected.
- Show Students in this grade only: —
  Select one grade level to display a list
  of students in the specified grade level
   useful for enrolling students into a
  course that only applies to one grade
  level. Click student names to add to
  the Current Roster. Click Save Student
  List and/or Copy Section when all
  students have been added.
- All Students: Select students from the list of all enrolled students. Click student names to add to the Current Roster. Click Save Student List and/or Copy Section when all students have been added.

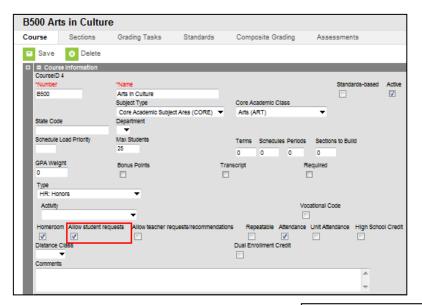










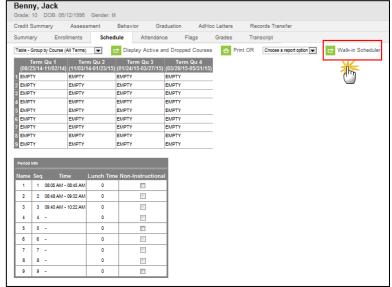


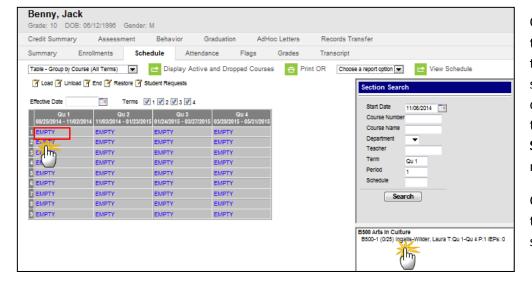
Students may also be added to classes individually. This method is recommended for enrolling students after the first of the year and for recording course changes.

To enable this functionality for a course, check *Allow student requests* on the **Course** tab.

Navigate to the student's **Schedule** tab: (Index/Student Information/General). Click the **Schedule** tab.

Click Walk-in Scheduler.





Click the **EMPTY** link on the student's schedule for the period you want to schedule. A list of courses meeting at that time will appear in a **Section Search** to the right of the schedule.

Click the section below the course to add it to the student's schedule.



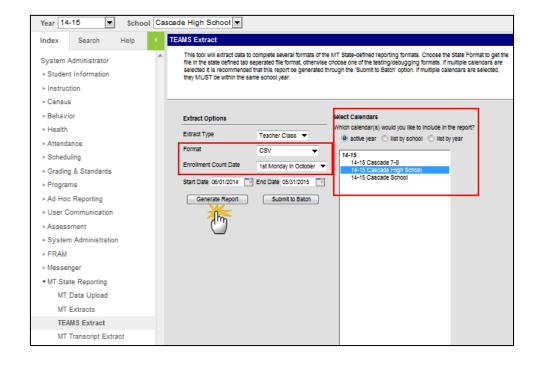


#### **Course Changes**

When a student moves from one course to another, do not deleted the course from the student's schedule.

As with an enrollment, end date the first course, then add the new course.

	Q1 08/28/2013 - 11/01/2013	Q2 11/04/2013 - 01/24/2014	Q3 01/27/2014 - 03/21/2014	Q4 03/24/2014 - 06/11/2014
01	740A-1 PE/Health 10-1st	740A-1 PE/Health 10-1st	EMPTY	EMPTY
02	940A-5 Algebra 2-1st	940A-5 Algebra 2-1st	EMPTY	EMPTY
03	868A-1 Honors English 10-1st	868A-1 Honors English 10-1st	EMPTY	EMPTY
04	430A-1 Spanish 2-1st	430A-1 Spanish 2-1st	EMPTY	EMPTY
Lunch	EMPTY	EMPTY	EMPTY	EMPTY
05	722A-1 Jazz Ensemble- 1st	722A-1 Jazz Ensemble- 1st	EMPTY	EMPTY
06	520A-2 Biology 1-1st Drop:10/04/2013	520A-2 Biology 1-1st Drop:10/04/2013	EMPTY	EMPTY
	Symphonic Band - 1st Start:10/07/2013	Symphonic Band - 1st Start:10/07/2013		
07	660A-7 Study Hall 1st	660A-7 Study Hall 1st	EMPTY	EMPTY
80	EMPTY	EMPTY	EMPTY	EMPTY
09	EMPTY	EMPTY	EMPTY	EMPTY
Activities	EMPTY	EMPTY	EMPTY	EMPTY



#### **TEAMS EXTRACT**

From the Index, expand MT State Reporting and select *TEAMS*Extract.

Under Format, select CSV.

Choose an *Enrollment Count Date.* (TEAMS uses the October

Count Date)

Select one or more Calendars.

Click **Generate Report**.

NOTE: TEAMS uploads are done by school. A separate upload file should be created for each school (but may include multiple calendars for that school.



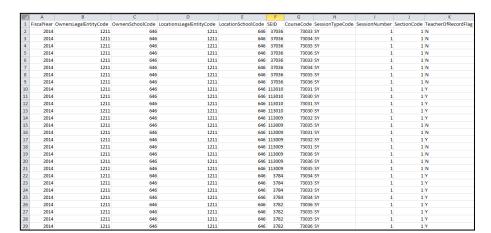


Prior to generating the report, a screen will *open showing two* warnings:

Warning 1: Teacher or staff member is assigned to an active section but is not assigned a state teacher role – need to verify that each section has an assigned Teacher of Record.

Warning 2: The following courses and sections have a credit amount that is greater than 2.0.

If both warnings show *Number of Records: O OR* all issues have been resolved, click *Click Here* to generate report.





Warning 1: Teacher or staff member is assigned to an active section but is not assigned a state teacher role.

Number of Records:0

Warning 2: The following courses and sections have a credit amount that is greater than 2.0.

Number of Records:0

Verify that data is entered into all fields.

If data is missing, check the steps above to correct the missing field.

If all data is entered and accurate, the file is ready for upload to TEAMS:

https://apps.opi.mt.gov/SSO/Logi n/Login.aspx (TEAMS Login Screen)

Follow the instructions provided in the TEAMS User Manual to upload the file:

http://www.opi.mt.gov/Reports&
Data/Index.html?gpm=1 11

**NOTE:** If you want to make changes in the file before uploadinginto TEAMS, you must <u>import</u> this file into Excel (i.e., not just open the file in Excel) to make any edits prior to uploading into TEAMS. The instructions for doing this begin on page 140 of the <u>TEAMS Users Manual</u> or you can view the video <u>here</u>. When done making edits, click "Save As..." and save it as a CSV file, which can be uploaded it into TEAMS.

For further assistance, contact the AIM Help Desk at opiaimhelp@mt.gov or 1-888-424-6681.



